NC eProcurement
Reporting

NC eProcurement Reports are designed to provide users with access to a variety of procurement information captured within the system. The information includes order summaries based on supplier, purchase requisitions waiting to be approved, and summaries by entity. NC eProcurement offers two types of reports, **Public Reports** and **Prepackaged Reports**.

Public Reports are reports created specifically for NC eProcurement with useful information tailored to our users. Examples of Public Reports include **'NCAS Open Transactions'** and **'Punchout Audit'** reports. **Prepackaged Reports**, on the other hand, are created by Ariba and are built into the tool itself. As such, there may be several Prepackaged Reports that do not necessarily apply to NC eProcurement users.

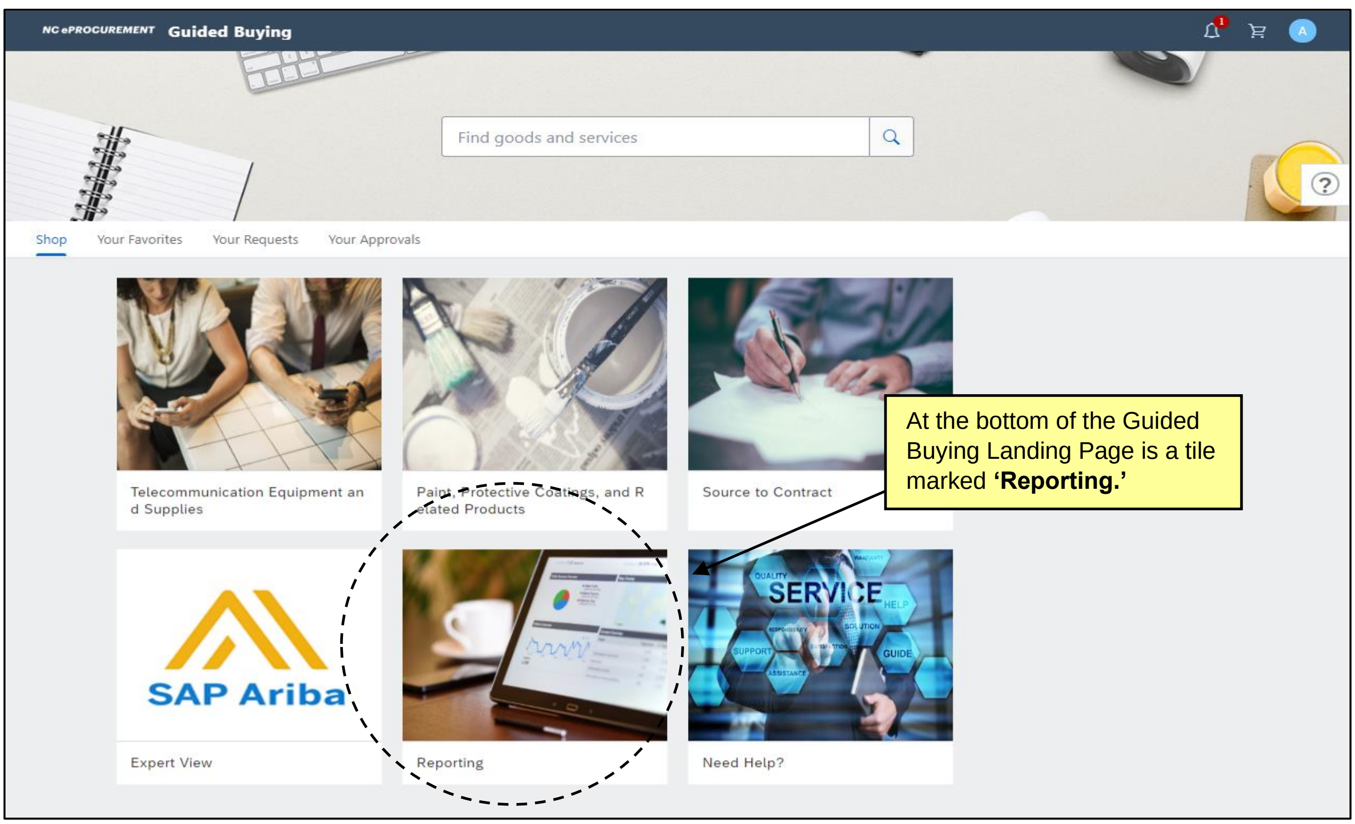
The reports are visible in HTML format and available in either Microsoft Excel or CSV format. Both formats may be downloaded and saved as files for future use.

All users will be able to access reports, but saved reports will appear only within that user's profile. Users with **'Global Reporting'** permission have the ability to view purchasing data for State entities beyond their own. Users who have the **'NC Reporting User'** role will be able to create background reports (see **Section IV** for more details).

I. Accessing Reports in Guided Buying

1. Reports can be accessed through both the Guided Buying View and Expert View of NC eProcurement.

2. From the Guided Buying Landing Page click on the tile labeled **'Reporting'** toward the bottom of the screen.



3. In the **'Reporting'** tile, locate the sub-tile that corresponds to the type of report desired, either **'Prepackaged Reports'** or a **'Public Reports.'**

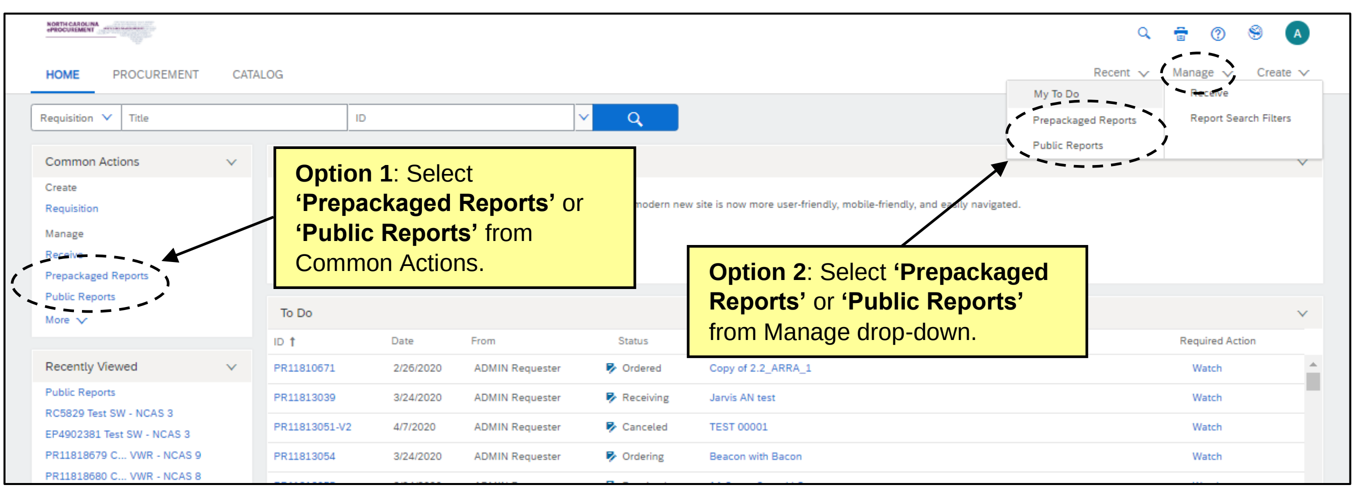
4. The Report Selection page will display. See **Section III** for details on choosing and running the desired report.

II. Accessing Reports in Expert View

1. To access Reports through Expert View, there are two options:

   a. Select **'Prepackaged Reports'** or **'Public Reports'** in the **'Common Actions'** portlet on the left side of the screen within either the **Home** or **Procurement** tabs.

   b. In the upper right corner of the screen, click the **'Manage'** drop-down and select either the **'Prepackaged Reports'** or **'Public Reports'** button.



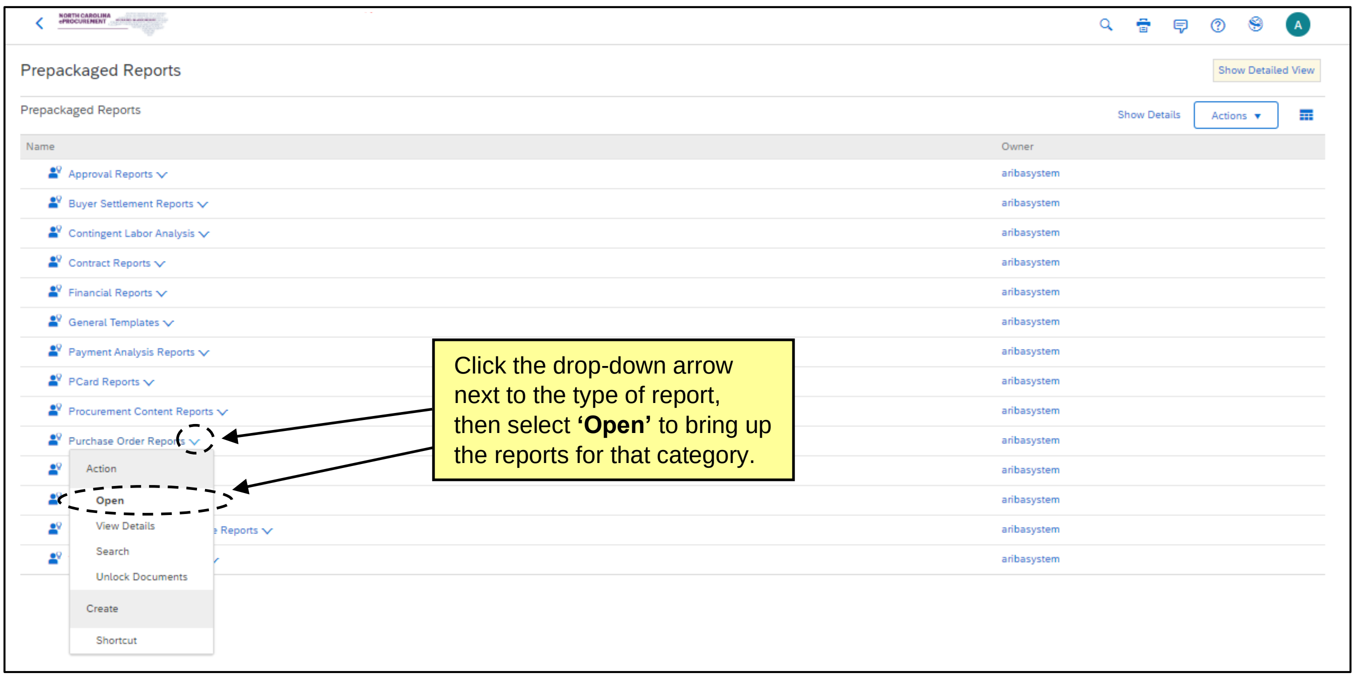
2. The Report Selection page will display. See **Section III** for details on choosing and running the desired report.

III. Customizing and Running a Report

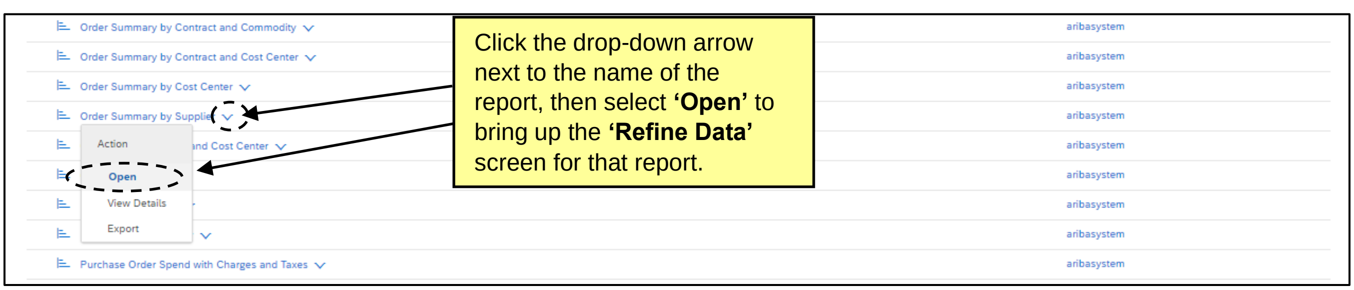
1. After selecting either Public Reports or Prepackaged Reports and arriving at the Report Selection page, users are able to determine which specific report to run, and can then customize that report.

   Note: Prepackaged Reports lists reports **alphabetically** by name with the owner listed to the right (always **'aribasystem'**). Public Reports are categorized in **folders**, with the creator of the report listed to the right. Only users in the **'NC Global Reporting'** group can create and publish a new public report.

2. Next, locate the category of report desired, and select the blue drop-down arrow next to that folder to expand the options. Select **'Open'** to see which reports belong in that folder.



3. After selecting the report category, the page will display the available reports within that category. To open the report, click the drop-down arrow to the right of the report and select the **'Open'** button.



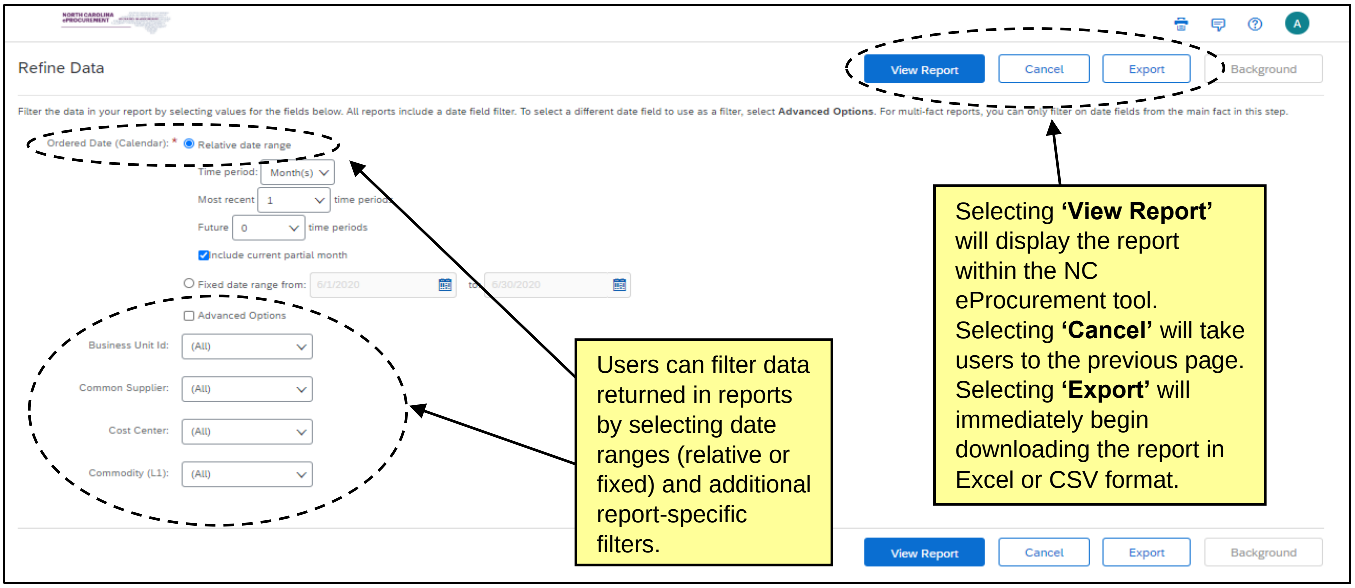
4. After selecting the report, use the **'Refine Data'** screen to filter the report by desired information. This screen allows users to set the following parameters for the data the report will return:

a. Relative date range (by year, quarter or month)

b. Fixed custom date range (by day)

c. And other filters dependent upon the report being run. Examples include **Supplier**, **Business Unit**, **Cost Center**, **Commodity**, **Catalog/Non-Catalog**, etc.

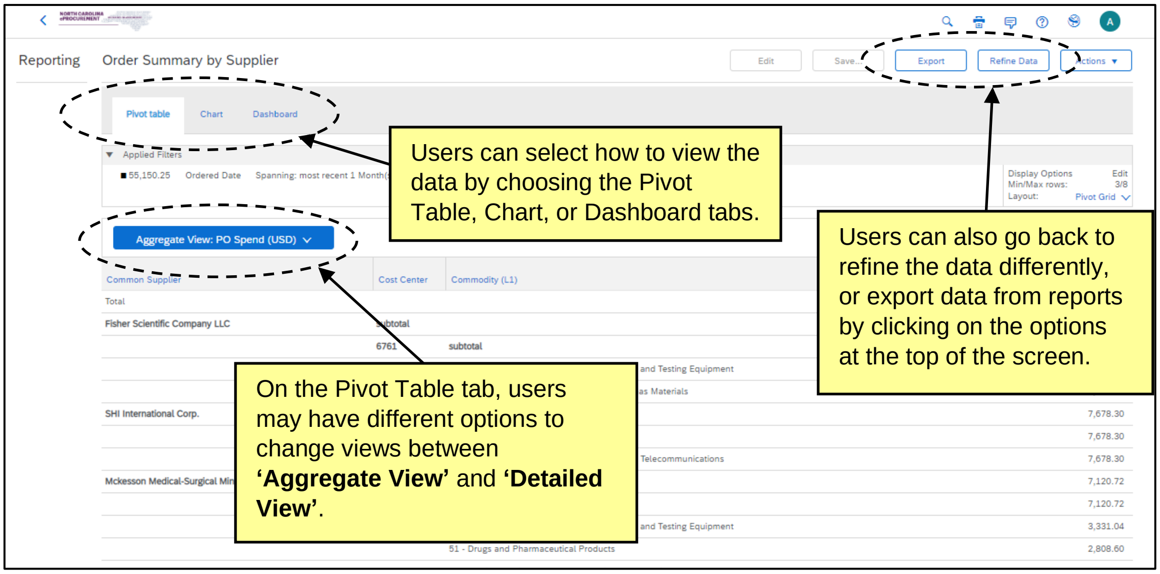
5. From the **'Refine Data'** screen, users can export the report directly, which will initiate a download into Excel or CSV format, or users can view the report within the NC eProcurement tool (HTML format).



6. Clicking on **'View Report'** brings up the Report Summary screen. From this screen, users can examine the returned data in text form in a Pivot Table, see the data represented in a chart, or view abbreviated summaries of both text and chart forms in a dashboard format.

Notes

- From the **'View Report'** page, users can go back to the **'Refine Data'** page to change inputs by clicking the **'Refine Data'** button on the top right of the screen.
- On the Pivot Table tab, users can view report data on a line-by-line basis using the **'Detailed View'** or view the data in a consolidated format using the **'Aggregate View.'**



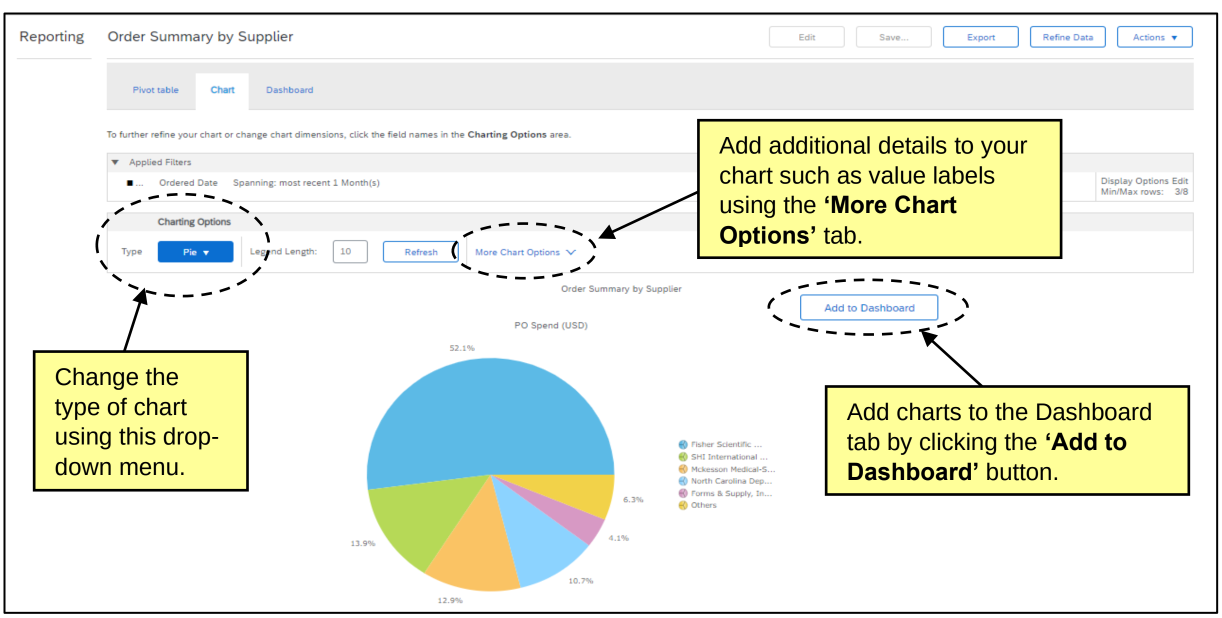
7. After a report is displayed, users can still perform the following actions:

    a. **Edit**: Modify the configuration of the report via the reporting wizard.

    b. **Save**: Save this version of the report to the user's **'Personal Workspace.'** A user's **'Personal Workspace'** will not appear under the **'Common Actions'** portlet until there is at least one saved report.

    c. **Export**: Automatically begin downloading to the data to a CSV or Excel file

8. Within the Chart tab, users have several options to change the format of the visual representation of their data. Users can choose between Column, Line, Bar, Pie, Area, Donut, or combination charts. Selecting the **'More Chart Options'** tab allows users to add details to the chart such as making it 3-dimensional or adding data labels to the chart.



9. The Dashboard tab shows a summary of both the chart and pivot table tabs, and users can add specific charts to the dashboard by clicking the **'Add to Dashboard'** button.

   Notes:
   - Adding information to a dashboard is a method to quickly view data in different formats, and each chart in the dashboard tab will be included when the report is exported. The dashboard will also return the same charts the next time the same report is run. For example, adding a bar graph and pie chart to the dashboard allows the user to see both graphs allowing users to see multiple versions of the data in one location (e.g. a bar graph and pie chart).

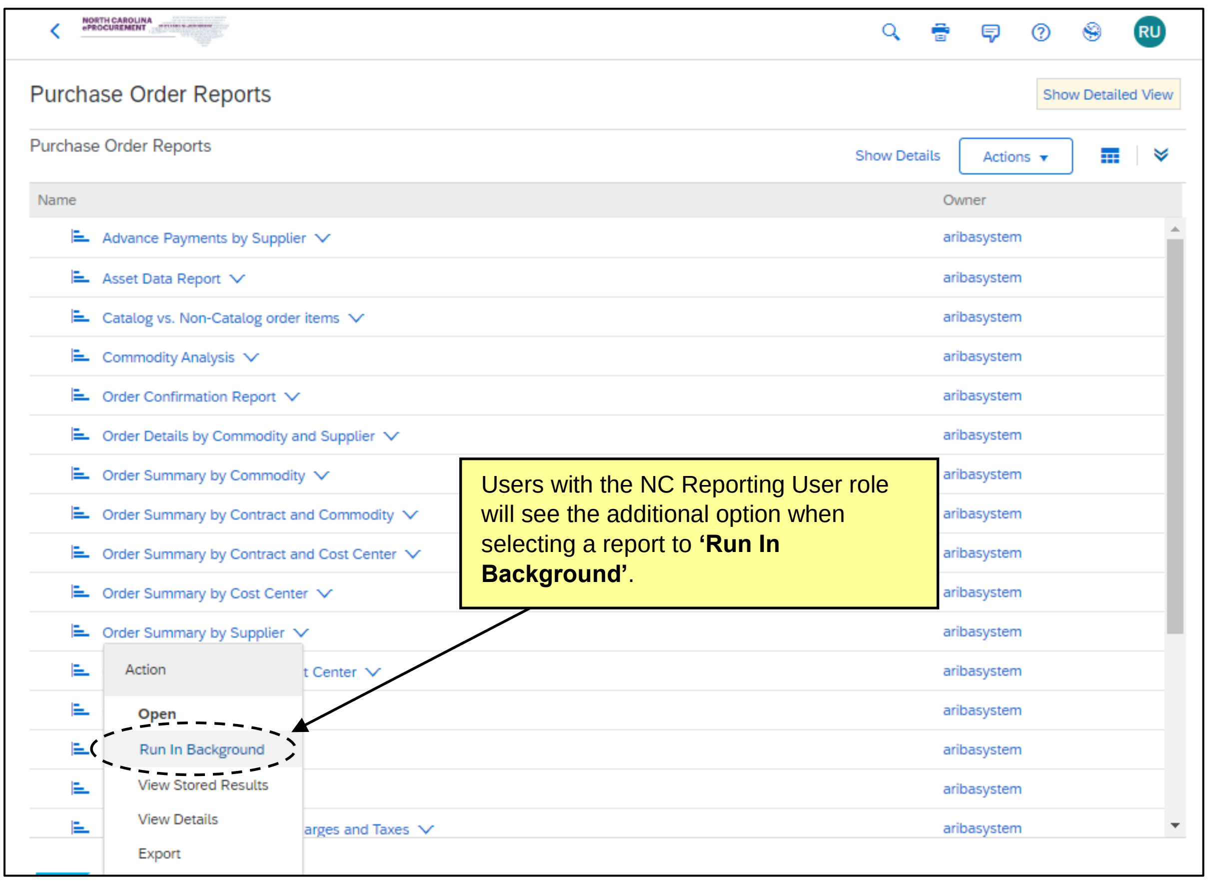
   - Adding a chart to a dashboard does not make it visible from the user's **'Home'** or **'Procurement** tab in Expert View. To add a report to a user's **'Home'** or **'Procurement'** see **Section V.**

IV. Running Background Reports

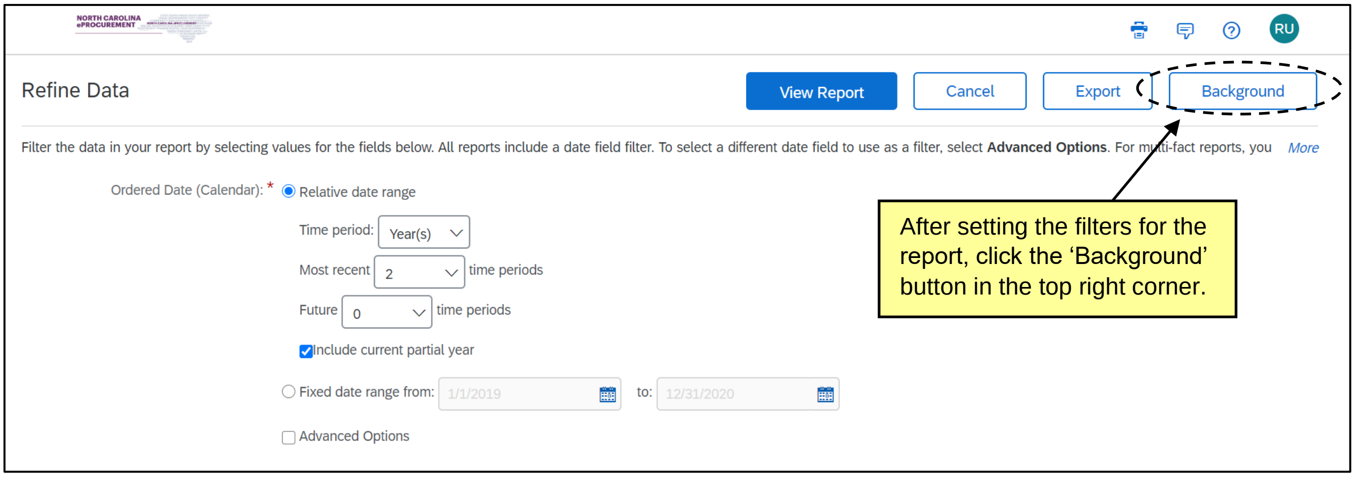
1. If a user has the **NC Reporting User** role, they will be able to run Background Reports which can run at set times without manual intervention.

2. Background Reports can be scheduled to run once, or in regular intervals. After the report runs, the user will receive an email notification, which can also be set up to include the report as an attachment.

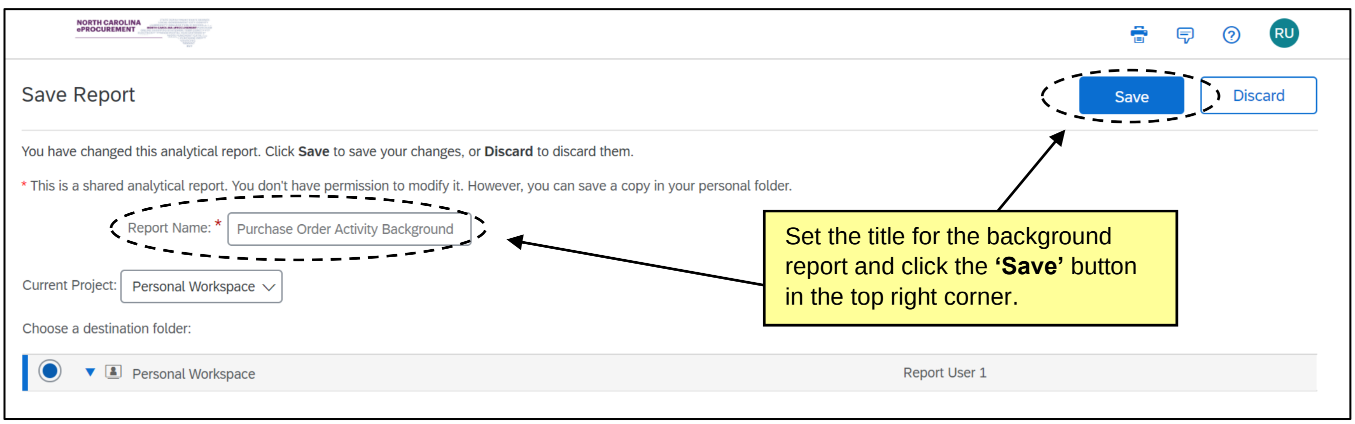
3. To create a Background Report, select either **'Prepackaged Reports'** or **'Public Reports'** and find the desired report (See **Sections I-III** for more details on accessing and finding reports). When clicking the drop-down arrow next to the report, choose the **'Run In Background'** option.



4. After selecting which report to run in the background, users will see the **'Refine Data'** screen and can input the parameters of the report as in **Section III.4.** Then click the **'Background'** button.



5. Title the background report and click **'Save'** to keep the background report in the **'Personal Workspace'** to view and edit the background report later.



6. After saving the report, the **'Schedule Background Report'** page will display. From this page, users may schedule the report through the following options:

   a. **'None':** Select this option to save the background report for future use without running the report at the time.

   b. **'Run once as soon as possible':** Select this option to run the background report once immediately. The report instance will be saved in the user's **'Personal Workspace.'**

   c. **'Run once on':** Select this option to have the report run only one time at a specified date and time.

   d. **'Run once for each period of':** Select this option to create recurring reports on a repeated basis. Users may set the time period, and the execution time of the reports, as well as the date range during which to run the background report. As an example, a user can set the report to run every 2 months, on the 1st of the month, at 7:00am, from June 1 through December 1.

7. At the bottom of the **'Schedule Background Report'** page, users may set the following specifications in the **'Report Details'** section of the page:

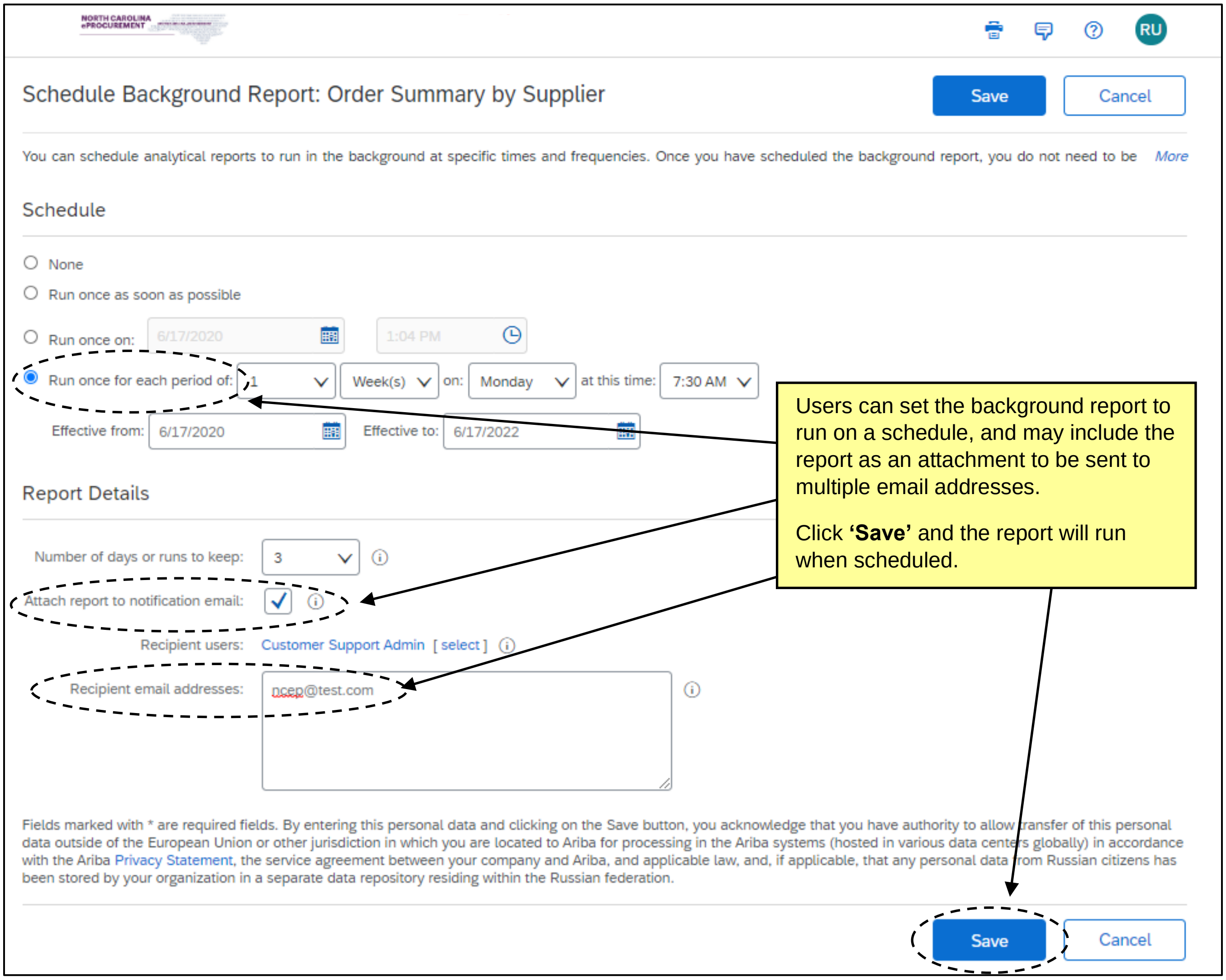
    a. **'Number of days or runs to keep':** This field specifies the amount of time results are stored in the user's **'Personal Workspace'** for reports that have been run. Number of runs is the number of stored results to keep for recurring reports. For example, if the number of runs of a recurring report to keep is 3, when the report runs for the 4th time, the oldest result will be deleted.

    b. **'Attach report to notification email'**: Check the box to include an Excel version of the report in an email to recipients.

       Note: If the report is not attached to the notification email, the recipients of the email will only be alerted that the report was successfully run. They will receive a summary stating only the number of rows of data in the report, but will not see any relevant data. The notification email recipients will also not be able to view the report within NC eProcurement.

    c. **'Recipient users'**: Click **'select'** for a list of internal (same entity) users to add as recipients of the notification emails when this report runs. Though not required, it is highly recommended that users add their own email to the list of recipients so they may verify the notification emails go out on time with the intended information.

    d. **'Recipient email addresses'**: Enter a list of external email addresses, separated by commas, that will receive notifications when this report runs. There is no limit on the number of email recipients, and users may send the email reports to email addresses that are not in NC eProcurement.



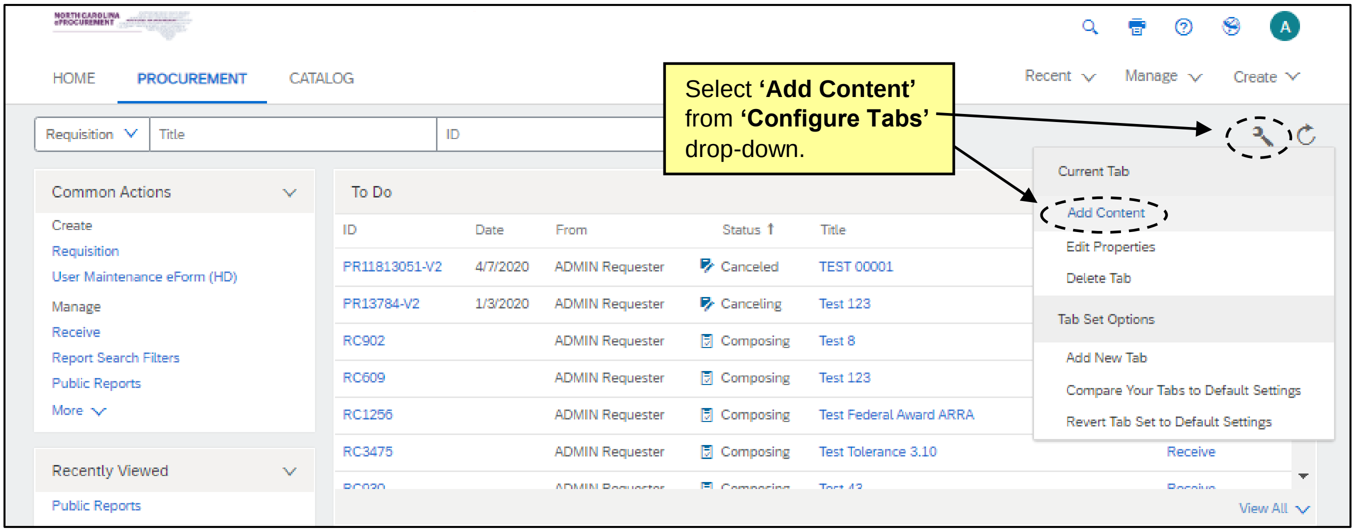
8. Click **'Save'** to save the background report to the user's **'Personal Workspace'** with the input parameters. On the next page, click **'OK'** to execute the background report based on the specified scheduling. The report will run automatically when scheduled.

9. To edit a background report, the user must open it from their 'Personal Workspace' and make any necessary changes.

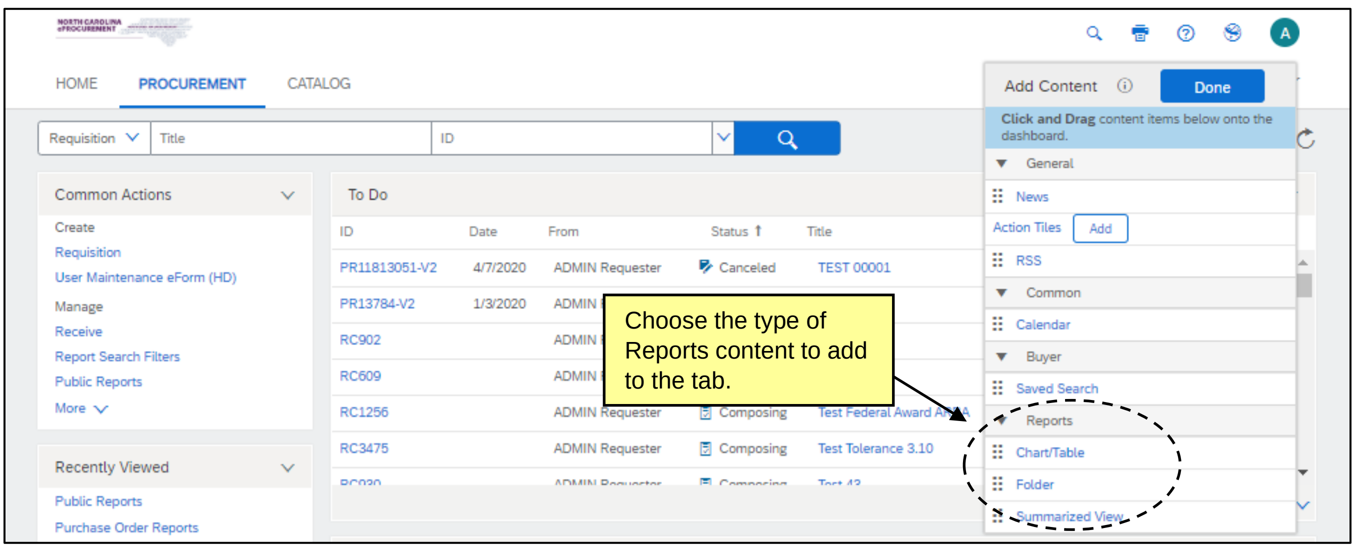
V. Adding Reports as a Portlet

1. Users who want to view reports quickly may add commonly used reports as a portlet on the **'Home'** or **'Procurement'** tab. Users may also add a portlet containing a folder of commonly used reports.

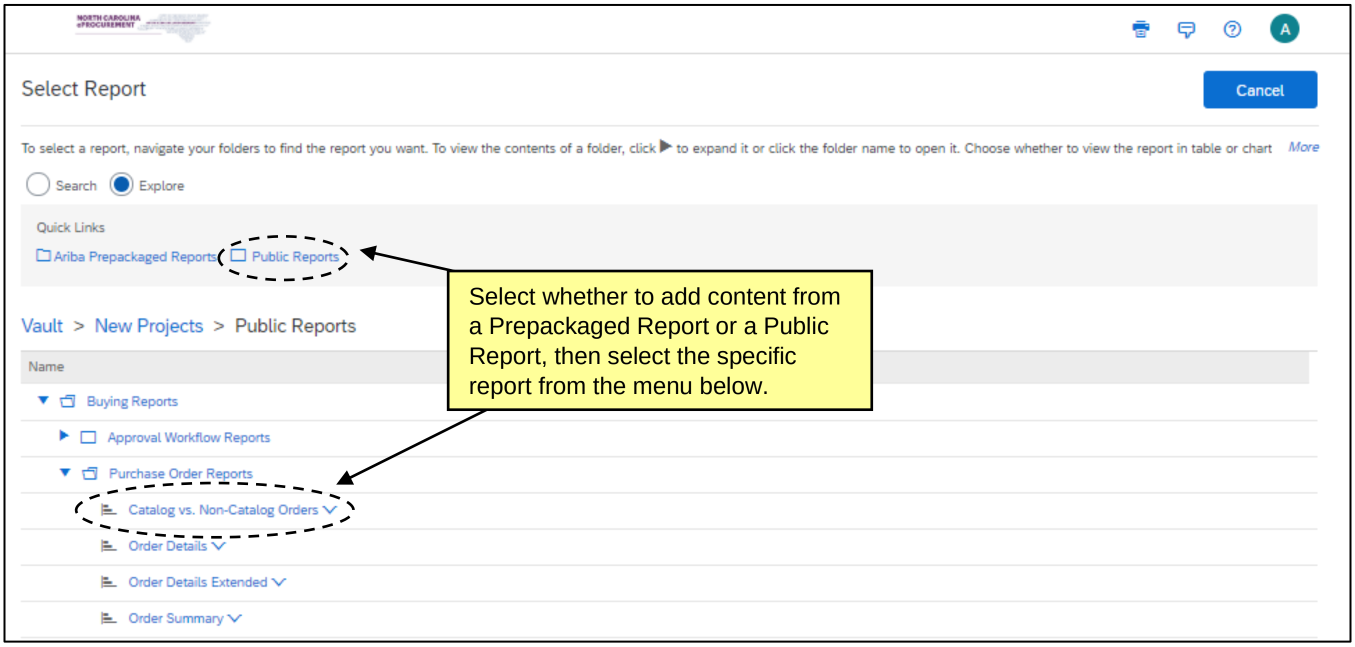
2. To begin adding a reporting portlet, navigate to the desired tab and select the **'Configure Tabs'** wrench icon. From the drop-down menu, select **'Add Content.'**



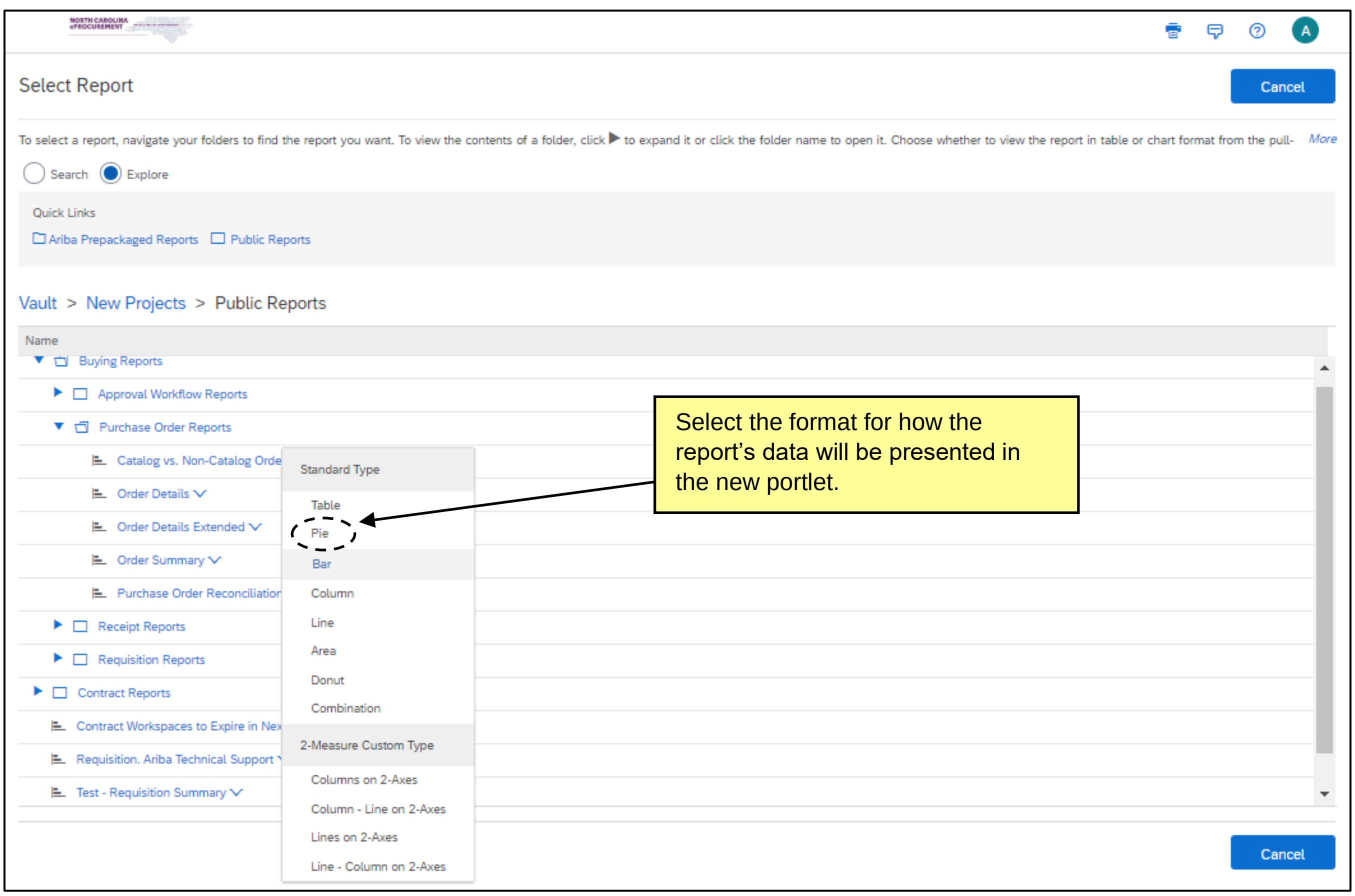
3. In the **'Add Content'** pop-up window, select whether to add a **Chart/Table**, a **Folder**, or a **Summarized View** of a report to the tab.



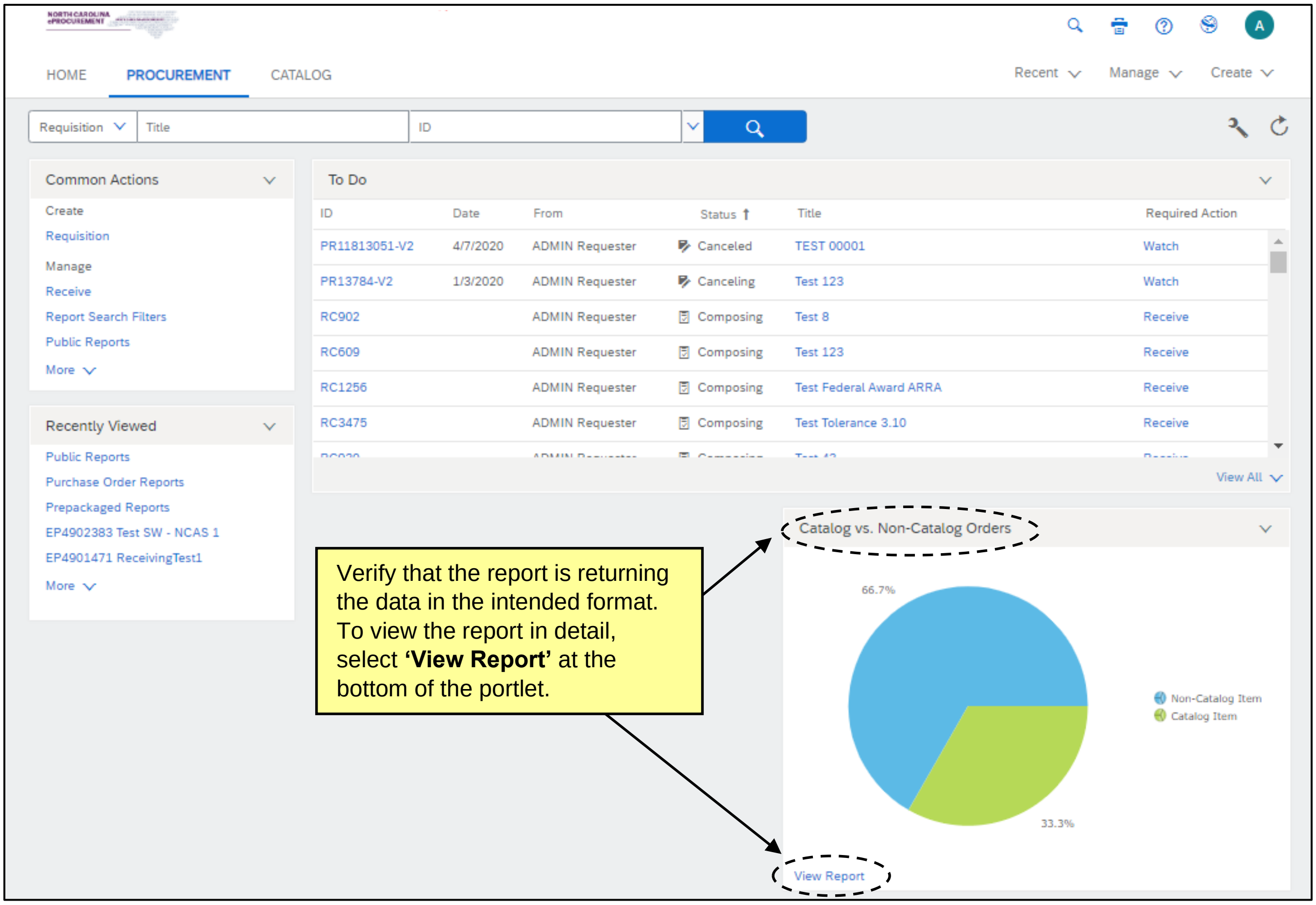
4. After selecting the content type, choose the specific report to add to the tab by navigating the same report folders in **Section III** of this job aid.



5. Click the drop-down arrow to the right of the selected report, and choose the type of data to be added to the tab.



6. Verify the report shows the intended data on the tab. To quickly access the report, select the **'View Report'** option at the bottom of the portlet, which will bring up the **'Refine Data'** screen of the report.



7. Users can add multiple reports portlets to their **'Home'** or **'Procurement'** tabs which will update in real-time. To change, delete, move, or resize your portlets within the **'Home'** or **'Procurement'** tabs, see the **Getting Started** job aid.